

OUTLOOK 2019 & 365

Email

In today's personal and professional worlds, email is the standard, acceptable, and easy way to communicate across your office and across the world. You can send and receive messages, files, pictures, music, and videos. In this chapter, you will be introduced to the types of email and learn how to set email options; send, read, reply to, and forward messages; and keep your email organized. Finally, you will search for messages without opening each folder.

LEARNING OBJECTIVES

- Set email options
- Send messages
- Handle incoming messages
- Organize messages

CHAPTER TIMING

- Concepts/Develop Your Skills: 2 hrs
- Self-Assessment: 15 mins
- Apply Your Skills: 30 mins
- Total: 2 hrs 45 mins

PROJECT: GETTING A HANDLE ON EMAIL BASICS

Now that Ann Hitchcock is familiar with the Outlook window and how to find help when she needs it, she's ready to learn about Outlook's email functions. She isn't too worried, as she's been using a webmail account for some time now, and she hears that there are a lot of similarities. In Ann's new job, she will be corresponding with her staff as well as staff at assisted-living homes, dog shelters, vendors, and others. Her predecessor has kept folders in a physical file cabinet for each person or organization with whom she corresponded. Ann wants to maintain that same organization with her electronic documents and save time when searching for a message.

Outlook Email

Of all the Outlook elements, email is the most widely used. It's the standard means of communicating in the business world, and it's certainly grown in popularity in our personal lives as well. Email is as simple to use as the telephone and is a convenient way to communicate, especially when you're busy. Many email options are available in Outlook. This chapter covers some of the most popular ones, including adding a signature to your messages and changing the font used for new email messages.

Types of Email Accounts

You can get email accounts from various sources: your company, an Internet service provider (ISP), or, maybe more familiar to you, a webmail provider such as Yahoo!® Mail, Gmail™, or Outlook.com (formerly Hotmail). An important detail to understand is that Outlook does not create or supply you with an email account; it merely provides you with *access* to your accounts and a more user-friendly way to manage them.

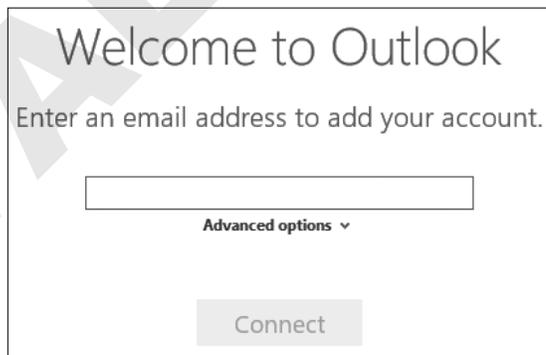
Adding Your Email Account

Any of the email accounts just described can be set up and accessed in Outlook. You will need to know some basic information to get any of them set up, such as what type of account it is, the email address, and the password.

Email Account Settings

Setting up an email to use in Outlook is quick and easy, and you can add more than one email if you have multiple addresses. The email address contains a username and domain name, separated by the at (@) sign. For example, in the email address *jsmith@anycorp.com*, *jsmith* is the username and *anycorp.com* is the domain name. Companies typically decide on the username format and other configurations for the email accounts, and then a network administrator sets up Outlook and your email account. Some companies and organizations are opting to go with email solutions such as Office 365, Outlook.com, or Gmail rather than maintain their own servers and support staffing.

Outlook will try to automatically add the account based on the information provided. When additional details are required, you can complete a manual setup (under Advanced Options).



Welcome to Outlook

Enter an email address to add your account.

Advanced options ▾

Connect

Backstage View

You can find the commands to change email settings and add another email account in Backstage view, which displays when you click the File tab. To return to the main window, click the Back button (the left-facing arrow in the top-left corner).

Working with Web-Based Simulations

Most of the Develop Your Skills exercises in this book are available as web-based simulations (WebSims). While you may perform these exercises as WebSims or live using your own Outlook account, this course assumes that all learners are using the WebSims when available.

NOTE! If you choose to work live, you'll be making your own decisions on whom you will send email to, when to set appointment times, what files to attach to messages, etc. You may also see "if working live" notes from time to time.

Whenever you see the WebSim  icon, you will be working as if you were using Outlook, though you'll be performing the exercise on a web page. Note that because Outlook uses your computer's system date, the dates in the figures in the book will not match the WebSims or your date.

DEVELOP YOUR SKILLS OU2-D1

In this exercise, you will set up an email account for Ann Hitchcock.



You may not have permission to set up a new account on the computer you are using, so all learners should complete this exercise via the online WebSim. You can access the WebSims from the Student Resource Center (labyrinthelab.com/office19) or use the direct links shown in the exercises.

1. In your web browser, go to: labyrinthelab.com/websims/O19-02-D1
2. Click the **File** tab to enter Backstage view and then click **Add Account** to launch the window to create a new account.
3. Fill in the email address field to create the new email account and, when prompted by the security window, enter the password.

Email address	<code>annhitchcock@outlook.com</code>
Password	<code>4s3cur!ty</code>

4. Click **Connect**.

Sending Messages

Most people who use Outlook are doing so to send and receive email. As with other email programs, you enter recipient addresses in the To, Cc, or Bcc fields, type a subject, write the message, and then send it on its way. You can move from field to field by either clicking in them or tapping **[Tab]** to move through them. After an address has been entered once, Outlook remembers it, so the next time you send an email and you begin typing the first few letters, a list of email addresses beginning with those letters appears. There are a few rules and email etiquette (also called *netiquette*) issues to point out:

DO'S AND DON'TS FOR PROPER EMAIL ETIQUETTE	
DO	DON'T
<ul style="list-style-type: none"> ■ Do summarize your message in the subject field but keep it brief. <i>Never send an email without a subject!</i> ■ Do use correct grammar, capitalization, and punctuation. <i>Emails should be brief and properly written, especially in business communications.</i> ■ Do type a semicolon between multiple recipients in the address fields. 	<ul style="list-style-type: none"> ■ Don't use spaces in an email address; it just won't work. <i>All email addresses must follow the same format: <code>username@domainname.com</code>.</i> ■ Don't type in all capital letters. It's considered YELLING. It also makes the text difficult to read. ■ Don't write anything in a message that you wouldn't want reported on the news or shared on social media. <i>Remember that email messages are permanently recorded.</i>

Sending to Multiple Recipients

A message can be sent to one or many recipients. When a message is sent to multiple recipients by entering addresses in the To field, everyone who receives the message will see the addresses of all other recipients. If you don't want everyone knowing to whom the message was sent, you can enter the addresses in the Bcc (Blind Carbon Copy/Blind Courtesy Copy) field instead. The Bcc field is not displayed by default in a new message window, but you can add it from the Ribbon. You will learn more about the email Ribbon options later in this chapter. Remember to *always* use a subject line to enable you and those with whom you correspond to easily determine the topic (and importance) of the email.

The Cc Field

The general rule is to place an address in the Cc (Carbon copy/Courtesy copy) field when that person is receiving the message only for informational purposes. That is, they have no action to take and are not expected to reply. Some people include their own email address in the Cc field to have a copy of the message sent to themselves.

The Bcc Field

The Bcc field is useful for protecting the privacy of others who are being copied on an email. For example, you wouldn't want to send an email to all your customers at once and for each of them to be able to see (and contact) the others! The Bcc field is also useful for preventing unnecessary messages by people clicking Reply All when responding to just the sender. Nobody can see who

is receiving a Bcc copy, but be aware that Bcc recipients can see any addresses in the To and Cc fields.

From field: If multiple email addresses are set up, choose the one from which to send here.

To field: For this email, Stephen is the intended recipient. Outlook doesn't show the whole email address for those you've communicated with previously; rather, after you select or type the address, Outlook converts it to the person's name.

Cc field: The message is only informational for Samuel. He is not expected to respond.

Bcc field: Neither Stephen nor Samuel can see that Piper is also receiving a copy of this email.

Subject line: This should be succinct yet descriptive so recipients will know what the email is about.

Message field: You type the message text, seen by all recipients, here.

The screenshot shows the following details:

- From:** annhitchcock@outlook.com
- To:** Stephen Sinatra
- Cc:** Samuel Vashon
- Bcc:** piperannelliott@gmail.com
- Subject:** Planning Meeting for Silver Creek Oaks
- Message body:** Hi Stephen,
Will you please send out a reminder for our planning meeting regarding the Silver Creek Oaks grants?
Thanks!
Ann

The Auto Complete Email List

Once you've sent a message to a recipient, Outlook "learns" the email address to make it easier for you to use again. To use these previously learned email addresses, or contacts you've already entered into Outlook, you can easily select them from the email list that appears when you start typing an email address.



When the email list appears, you can either click the address or tap **Tab** when it's highlighted to select the entry.

This Auto Complete list is a separate file created by Outlook and is often overlooked when changing computers. Learn more by doing a web search for *Outlook NK2 file*.

DEVELOP YOUR SKILLS OU2-D2

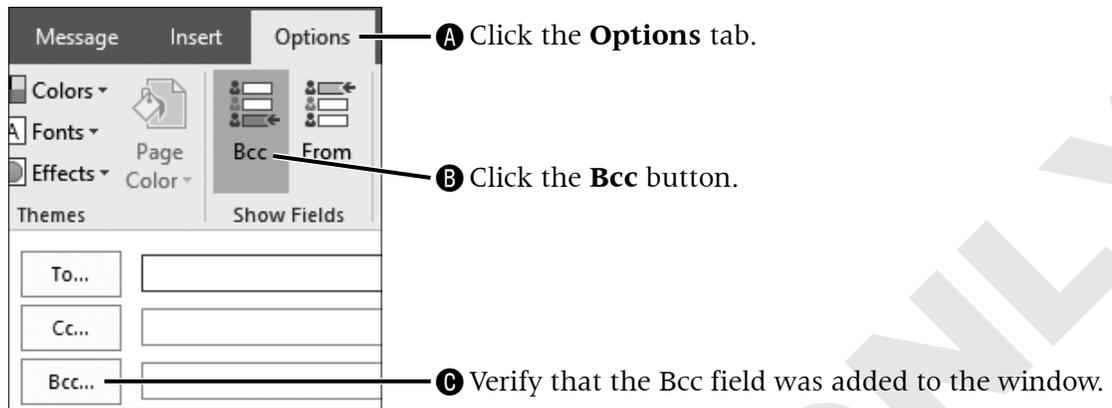
In this exercise, you will create and send two new email messages.



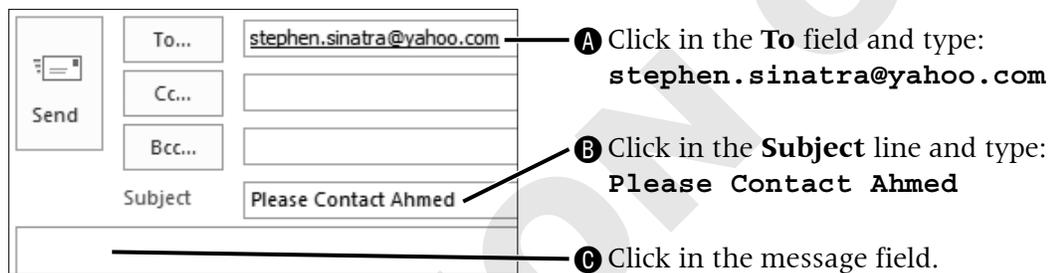
Complete this exercise live or via the online WebSim at:
labyrinthlab.com/websims/O19-02-D2

1. Choose **Home**→**New**→**New Email** .

2. Follow these steps to add a Bcc field to the message window:



3. Follow these steps to enter the email address and subject:



4. Type this in the message field, tapping **Enter** where indicated:

Hi Stephen, **Enter**

Enter

Will you please call Ahmed from Eugene Field Care Facility to
arrange training for his staff? **Enter**

Enter

Sincerely, **Enter**

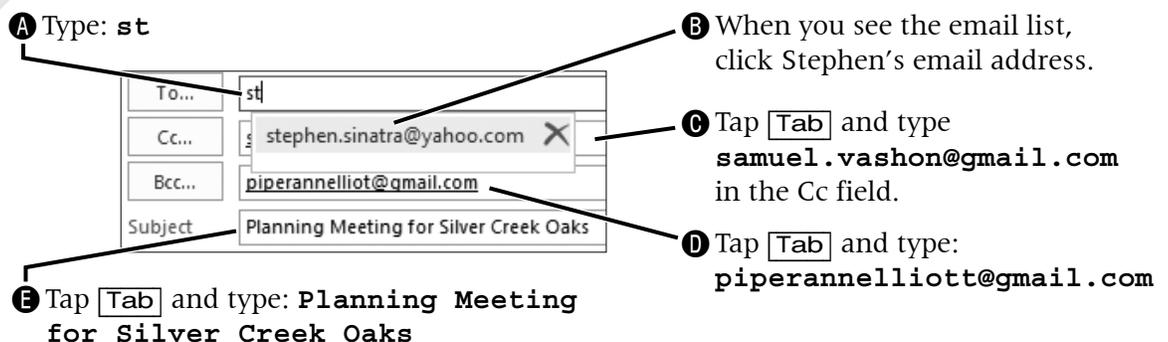
Ann

5. Click **Send** .

NOTE! Buttons may appear differently in Outlook 365, and the appearance of elements in the online app may change more frequently.

6. Choose **Home**→**New**→**New Email** .

7. Follow these steps to complete the header section of the message:



8. Click in the message field and type:

Hi Stephen,

Will you please send out a reminder for our planning meeting regarding the Silver Creek Oaks partnership?

Thanks!

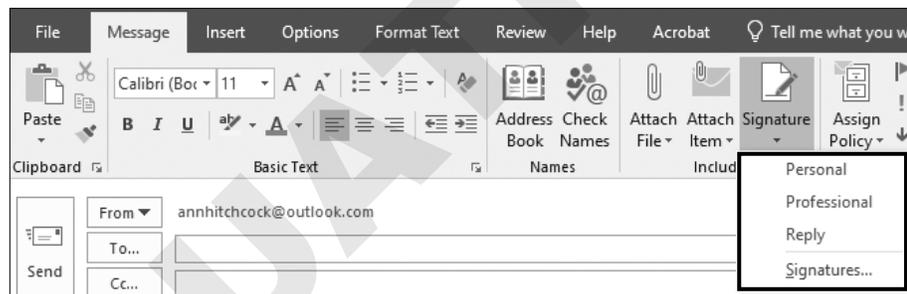
Ann

9. Click the **Send** button.

Signatures

A signature is the text you enter at the end of a message. This often includes your name, title, company, and other contact information such as phone number. You can create one or more signatures that Outlook will store and keep ready for you to insert at any time. You can also designate default signatures to be inserted automatically into each message you respond to or create.

The Ribbon in the New Email window displays different tabs across the top that are related to creating email messages. The Insert tab, for example, contains buttons related to inserting a file, picture, SmartArt, hyperlink, or a signature in your message. Outlook stores all the signatures you create and lets you pick and choose which to insert in any message. The Signature command is found on both the Message and Insert tabs.



The New Email window with the Message tab active and the list of available signatures expanded

DEVELOP YOUR SKILLS OU2-D3

In this exercise, you will create new signatures that will give your emails a consistent appearance. For business purposes, a clean, professional look is expected; for personal use, you can be creative!



Complete this exercise live or via the online WebSim at:
labyrinthlab.com/websims/O19-02-D3

1. Choose **Home**→**New**→**New Email** .
2. Choose **Message**→**Include**→**Signature**  menu button ▼ →**Signatures**.

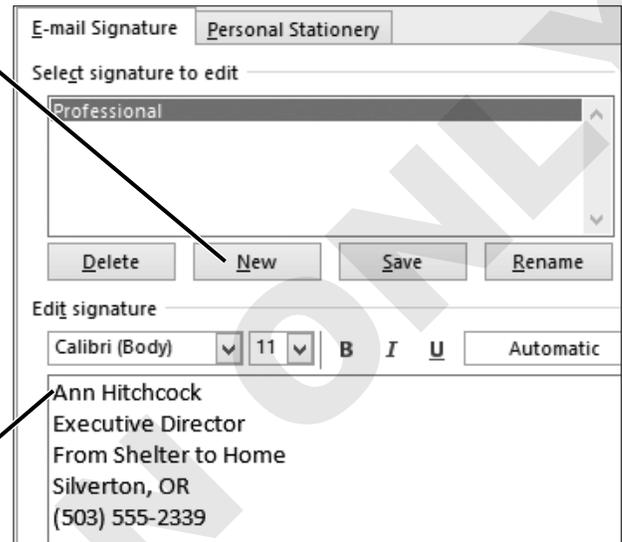
3. Follow these steps to create a new signature:

A Click the **New** button in the Signatures and Stationery dialog box.

B Type **Professional** as the signature name and click **OK**.



C Click in the **Edit Signature** text box and type the text shown, tapping **Enter** after each line.



D Click **Save** (don't close the Signature window).

4. Click **New** to create another signature.

5. Type **Personal** as the signature name and click **OK**.

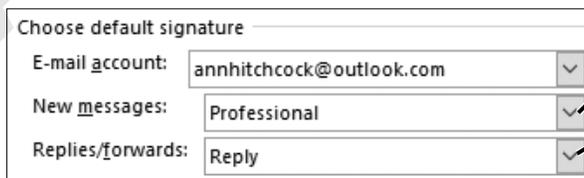
6. Click in the **Edit Signature** text box and type Ann's signature:



7. Click **Save** and then click **New** to create a final signature.

8. Type **Reply** as the signature name and click **OK**, and then type **Ann** as the signature text and click **Save**.

9. Follow these steps to set default signatures:



A Click the **New Messages** box and choose **Professional**.

B Click the **Replies/Forwards** box and choose **Reply**.

C Click **OK**.

10. Close the Untitled – Message window. If prompted, click **No** to discard the changes.

Changing and Inserting Signatures

Now that you've learned how to create a signature and how to set one up to be inserted automatically, you need to know how to insert one manually and how to change the one automatically inserted. Some people create multiple signatures but never set one up as a default, which is a good idea in many instances. For example, if you create a fun personal signature as a default (in our example, *Executive Mommy*) but forget about it and send a letter to the president of the company, you would probably be embarrassed when you realized what you did. If you do set a default signature, use the one that would be most appropriate for all your emails. In this example, that would be the Professional signature.

DEVELOP YOUR SKILLS OU2-D4

In this exercise, you will quickly apply the appropriate signature to your current email message.



Complete this exercise live or via the online WebSim at:
labyrinthelab.com/websims/O19-02-D4

1. Choose **Home**→**New**→**New Email** .
2. Compose the message:

To field	luv-my-kids@outlook.com
Subject field	Carpool
Message field	Type above the signature! Hi Lucy, <input type="text" value="Enter"/> Could you please drive the kids' carpool for me tomorrow?

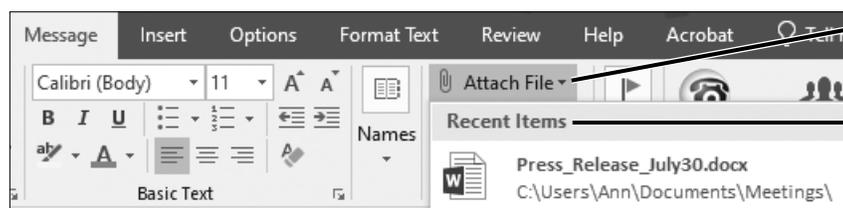
3. Now, to change the signature from the default one, choose **Message**→**Include**→**Signature**  **menu button** ▼→**Personal**.
4. Click **Send** .

Attaching Files

Outlook allows you to attach other files to your messages, including a Word or Excel file, a picture, other Outlook items, and more. When recipients receive the message, they can either view the attachment in the Reading pane or open the file in the associated program.

One very useful feature is the Recent Items list that appears when you use the Attach File button. If you're working on a report in Excel, for example, you can save it and send it in an email very quickly and easily by choosing the file from the Recent Items list. Both the Message tab and the Insert tab contain the Attach File command.

TIP! Another method of attaching files is to simply drag and drop files into the body of the message.



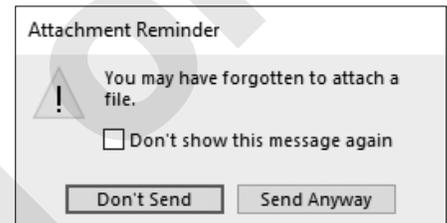
The Attach File command is in the Include command group.

You can attach a recently used file to an email by clicking it in the list.

After you attach a file, it appears under the Subject box with a menu for additional options for working with the attachment.

To...	piperannelliott@gmail.com
Cc...	stephen.sinatra@yahoo.com ;
Bcc...	
Subject	Press Release for From Shelter to Home
Attached	 Press Release July30.docx (42 KB)

TIP! If you include the keyword *attach* (or *attached*, *attachment*, etc.) in the email message but don't attach a file, when you choose to send the message, Outlook will remind you to add the attachment!



DEVELOP YOUR SKILLS OU2-D5

In this exercise, you will attach a file to an email message using the Recent Items list.



Complete this exercise live or via the online WebSim at:
labyrinthelab.com/websims/O19-02-D5

1. Choose **Home**→**New**→**New Email** .
2. Address the message to **piperannelliott@gmail.com** and, in the Cc field, add **Stephen Sinatra**.
3. Enter the subject line and message body:

Subject field	Press Release for From Shelter to Home
Message field	<p><i>Type above the signature line!</i></p> <p>Hi Piper,</p> <p>Please find a press release attached that describes a grant that has been awarded by our organization.</p> <p>Sincerely,</p>

4. Choose **Message**→**Include**→**Attach File**.
5. Select the **Press_Release_July30** document from the Recent Items list to attach it to the email message.
If working live, choose any file from the list.
6. Send the message.

7. Click the **New Email**  button.

Address the message to **Sadie James** and **Frasier Heron**.

Hint: Type the first few letters of each and choose their names from the list.

If you're working live, use two of your classmates' email addresses.

8. Enter the subject and message body:

Subject field	Review of Annual Budget
Message field	Type above the signature line! Please review the attached budget prior to our next budget meeting.

9. Choose **Message**→**Include**→**Attach File**.

10. Click **Browse This PC** at the bottom of the Recent Items list to open the Insert File window.

11. Navigate to your **Outlook Chapter 2** folder and double-click **FSTH_Budget**.

12. Send the message.

13. Create and send one additional message:

If working live, replace Sadie James and Frasier Heron in the To field with two of your classmates' email addresses.

 Send	From ▼	annhitchcock@outlook.com
	To...	<u>stephen.sinatra@yahoo.com</u> ; <u>samuel.vashon@gmail.com</u> ; <u>Sadie James</u> ; <u>Frasier Heron</u> ; <u>mary.mckay025@gmail.com</u>
	Cc...	
	Bcc...	
	Subject	Please Review the Minutes
Attached	 Meeting_Minutes_July16.docx 33 KB	

Hello Team,

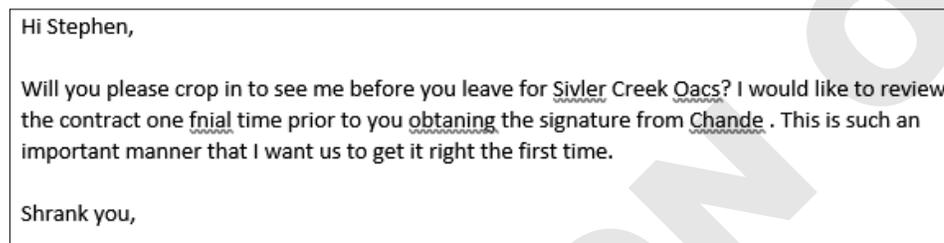
Thank you for a productive meeting. I am excited about the new partnership with Silver Creek Oaks. Please review the attached minutes and respond with any edits.

Ann Hitchcock
Executive Director
From Shelter to Home
Silverton, OR
(503) 555-2339

The Spelling & Grammar Checker

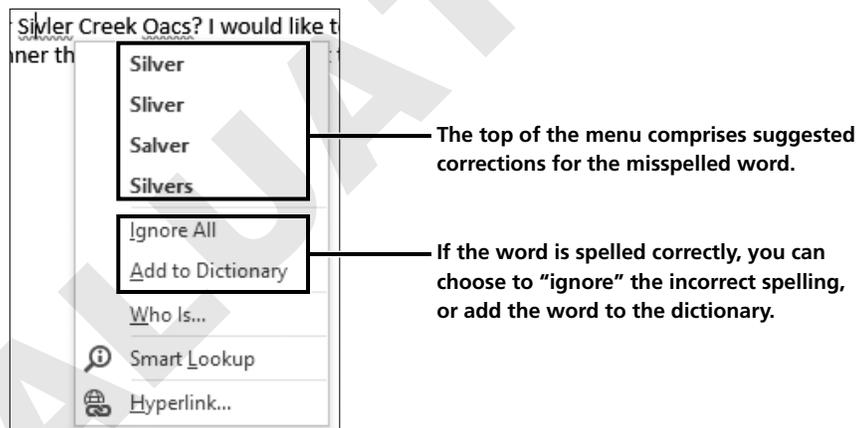
Outlook has a spelling and grammar checker you can use to check for spelling errors in the body of a message, in an appointment, or in the Notes section of a contact. You must still proofread your messages, because the checker will mark a word as a possible error only if it's not in the Outlook dictionary. For example, you wouldn't want to send an email about the results of the *Broad Meeting* instead of the *Board Meeting*. You can see why proofreading is so important! The spelling and grammar checker is a shared feature across all Office programs, so if you add a new word to the dictionary in Outlook, it will also be available in a spelling check in Word, Excel, and other Office programs.

A possible spelling error is indicated with a wavy red line under the word. You can fix the problems as you type, or you can wait until you have completed the message and check for errors all at once.



The spelling checker found five misspellings in this email but there are four other errors. Can you spot what the checker missed?

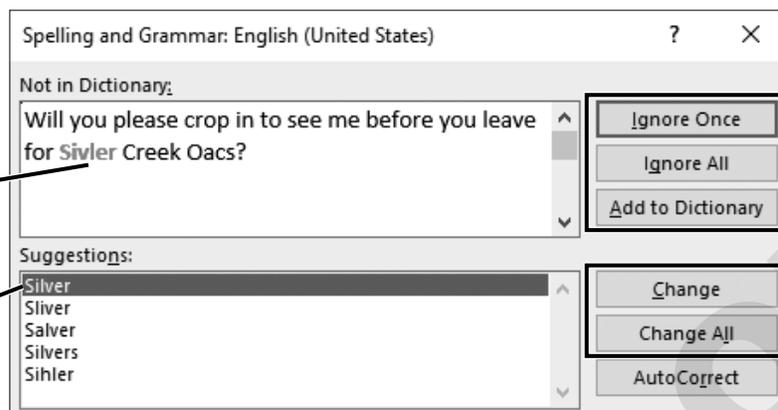
You can quickly correct a mistake by right-clicking the misspelled word and choosing the correct word from the menu. Alternatively, you can manually correct the word by typing the correct spelling.



When the checker is launched, the upper section of the Spelling and Grammar dialog box displays the entire sentence containing the error, which is highlighted in red. The lower section displays a list of possible corrections.

The Not in Dictionary box displays the sentence and highlights the possible error. You can edit the error manually if the correct suggestion doesn't appear.

The Suggestions box displays possible corrections for the error.



You can choose to ignore once or always, or to add the word to the dictionary.

You change the word in the current instance or every time the misspelling appears in the message.

☰ Review → Proofing → Spelling & Grammar | F7

DEVELOP YOUR SKILLS OU2-D6

In this exercise, you will see how Outlook can spot misspelled words and suggest replacements. However, remember that you still need to check your work, as it doesn't catch every error.



Complete this exercise live or via the online WebSim at:
labyrinthelab.com/websims/O19-02-D6

1. Choose **Home** → **New** → **New Email** .
2. Address the message to **Stephen Sinatra**.
3. Type **Contract Review** as the subject.
4. Type the message text exactly as shown, including the typos and tapping **Enter** as needed. Use the Professional signature that is automatically inserted.

Hi Stephen,

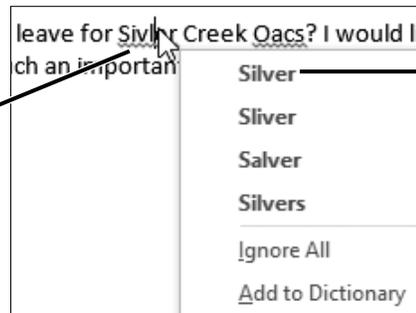
Will you please crop in to see me before you leave for Sivler Creek Oacs? I would like to review the contract one fnial time prior to your obtaining the sgnature from Chande. This is such an important manner that I want us to get it right the first time.

Shrank you,

Note that after you type the incorrect spelling "sgnature," Outlook replaces it with the correct spelling. AutoCorrect at work!

5. Follow these steps to correct the first highlighted spelling error:

- A** Point to the misspelled word, *Sivler*, and then click the right mouse button to display the options menu.

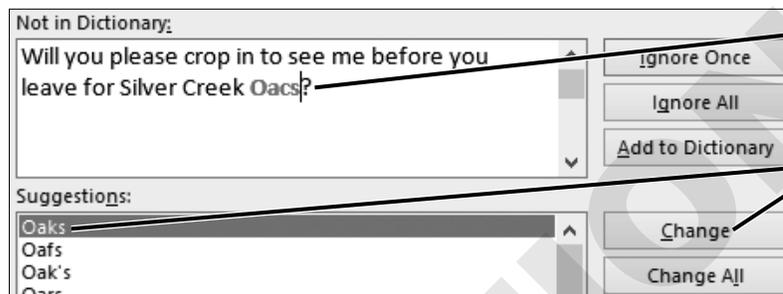


- B** Choose the correct word, *Silver*, from the list of suggestions.

6. Right-click **Chande**, which is the correct spelling, and choose **Ignore All** from the menu.

7. Choose **Review**→**Proofing**→**Spelling & Grammar** .

8. Follow these steps to address the next error in the message:



- A** Look at the red word that is a possible error and determine whether it is an error.

- B** Ensure that *Oaks* is the highlighted suggestion and click **Change**.

9. Click the **Change** button to accept the suggested word, *final*, for the next error.

10. Click **OK** in the Spelling and Grammar window.

Although Outlook responds with a message indicating the spelling check is complete, there are some words in this message that are spelled correctly yet misused.

11. Proofread the first sentence, double-click **crop**, and type: **stop**

12. Proofread the last sentence, double-click **manner**, and type: **matter**

13. Proofread the signature, double-click **Shrank**, and type: **Thank**

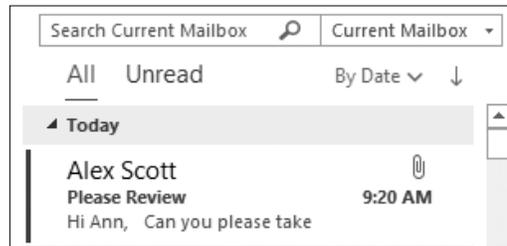
14. Send the message.

Handling Incoming Messages

Outlook has many choices of what to do with incoming messages. You can read and delete, read and save, reply, forward, move to another folder, or print. If the message has an attached file, you can save the attachment on your hard drive or other storage device, separate from the email message. Keeping your email messages organized is one of the most important ways to keep your work communication efficient and to reduce stress at work! Every person will have different ways of doing this, but there are some good tips and guidelines everyone can follow.

Reading Messages

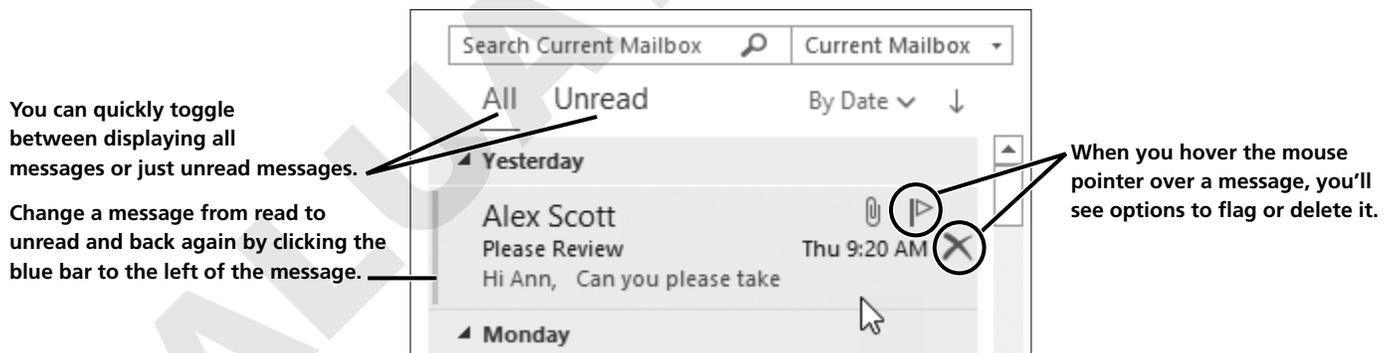
Outlook receives messages automatically (though you can click the Send/Receive All Folders button on the Send / Receive tab as desired) and new messages first display in the Inbox. By default, the message is indicated as new with the subject appearing in bold, blue type as well as a blue bar to the left of the message.



You can read the contents of the message in the Reading pane, or you can double-click the message to open the email in a separate window (helpful for longer emails). A message with an attachment is indicated with a small paperclip. Once you view a message in the Reading pane it's considered "read" and will no longer have the special formatting. However, you can mark messages as unread or read at any time from the Ribbon, the Inbox, or by right-clicking the message itself.

TIP! If you inadvertently click a new message without actually reading it, you can mark it as "unread" to remind yourself to come back to that message later.

You may notice that when you hover the mouse pointer over a message, it becomes highlighted and icons appear to assist you in working with the message, such as flagging it or deleting it. You can also right-click any message for more options.



By default, your messages will show as conversations, which group messages in your Inbox or folders based on the Subject box contents. This is a convenient way to track the exchange of several emails about a specific topic. Only the most recent email will appear, but the conversation can be expanded to view all emails in the conversation by clicking the small white arrow to the left of the message.

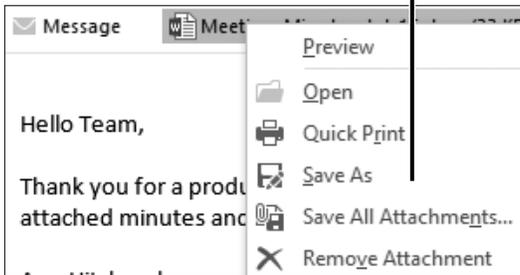
Saving Attachments

When you receive a message with an attachment, you will see the name of the file in the message box directly above the body of the message. Some file types, such as Word or Excel files,

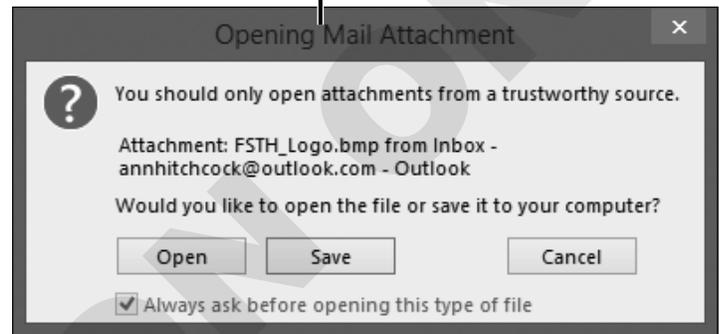
open automatically in the appropriate program when you double-click the attachment. Other files, such as graphics files, display an Opening Mail Attachment dialog box with options to open or save. You can also right-click an attachment to display a menu with such options as Open, Save As, and Quick Print.

WARNING! Viruses are often passed through email messages and their attachments, especially those with the .exe extension. Be very mindful of the type of file and who it is from before you open it.

When you right-click a message attachment, you will see an options menu from which you can choose to save the attachment.



When you attempt to open some types of attachments, you may see the Opening Mail Attachment dialog box to warn you of possible dangers.



DEVELOP YOUR SKILLS OU2-D7

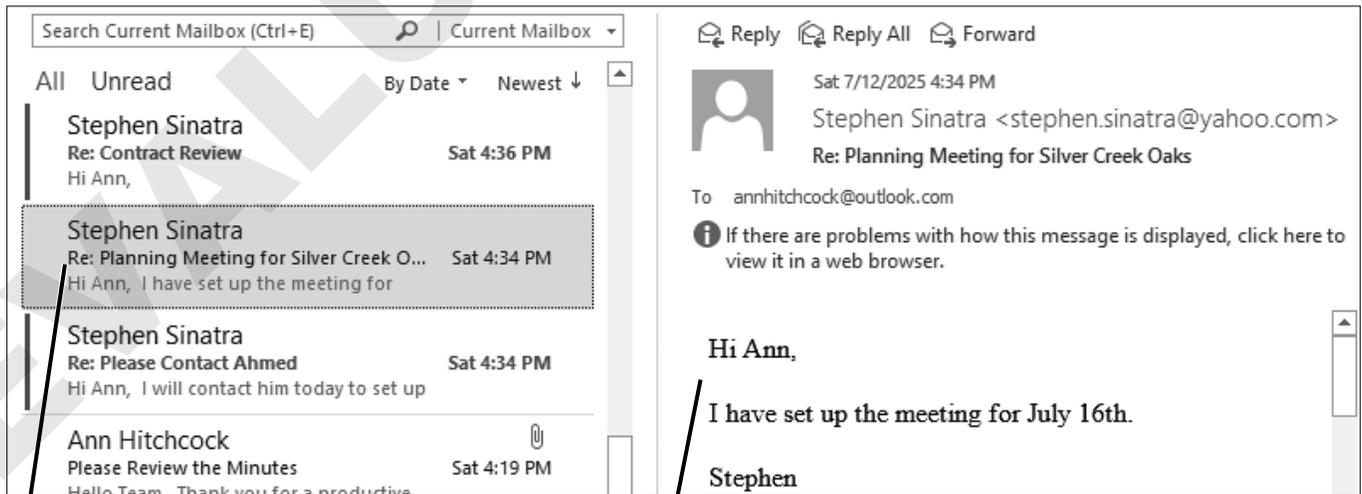
When you receive emails containing attached files, you have options. In this exercise, you will open such a message and then save the attachment.



Complete this exercise live or via the online WebSim at: labyrinthlab.com/websims/O19-02-D7

1. Follow these steps to read a message:

If working live, choose any message in your Inbox.



A Choose the **Planning Meeting for Silver Creek Oaks** message from Stephen Sinatra.

B Read the message in the Reading pane.

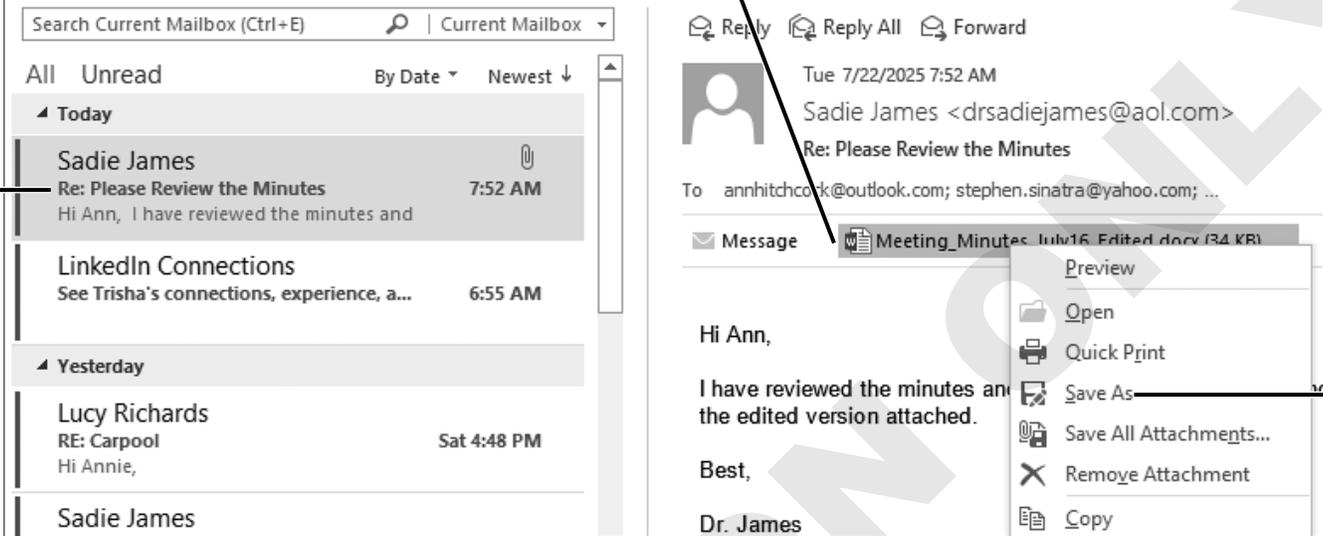
2. Follow these steps to save an attachment:

If working live, choose any message in your Inbox with an attachment.

A Choose the **Please Review the Minutes** message from Sadie James.

B Right-click the attached file.

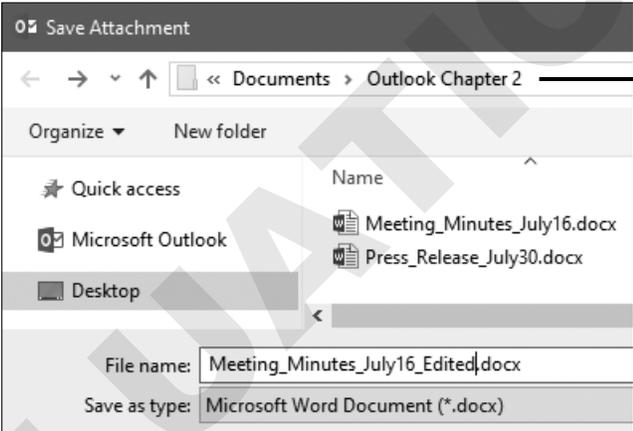
C Choose **Save As...**



The screenshot shows the Outlook interface. On the left, the 'Today' group contains a message from Sadie James titled 'Re: Please Review the Minutes' with a paperclip icon. The main pane shows the email content, including the sender's name and email address, the subject 'Re: Please Review the Minutes', and the recipient list. The body text reads 'Hi Ann, I have reviewed the minutes and the edited version attached.' Below the text is a Word document attachment named 'Meeting_Minutes_July16_Edited.docx (34 KB)'. A right-click context menu is open over the attachment, listing options: Preview, Open, Quick Print, Save As..., Save All Attachments..., Remove Attachment, and Copy. The 'Save As...' option is highlighted.

D Navigate to your **Outlook Chapter 2** folder.

E Click **Save**.



The screenshot shows the 'Save Attachment' dialog box in Windows File Explorer. The address bar shows the path 'Documents > Outlook Chapter 2'. The 'Name' field contains 'Meeting_Minutes_July16_Edited.docx' and the 'Save as type' is set to 'Microsoft Word Document (*.docx)'. The file list shows two files: 'Meeting_Minutes_July16.docx' and 'Press_Release_July30.docx'.

Replying to and Forwarding Messages

Outlook makes it easy for you to reply to a message or to share it with others by forwarding it. At the top of each message you will see the buttons to Reply, Reply All, or Forward an email. You may change the subject when replying to or forwarding a message, if you wish. By default, replying to and forwarding messages are done from within the Reading pane. When composing a message in the Reading pane, you have two additional choices: You can quickly discard the message or pop your reply out of the Reading pane into a separate window.

Reply or Reply All

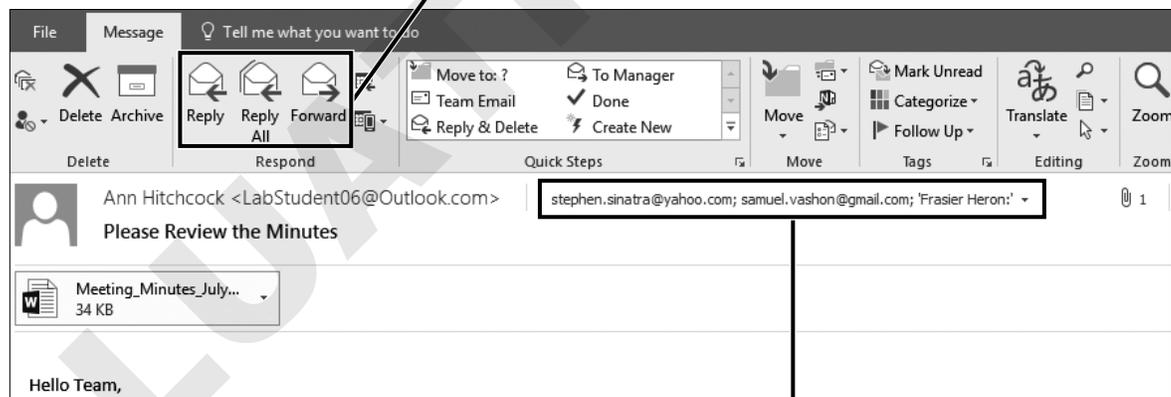
When you click the Reply button, Outlook creates a new message and places the sender's email address in the To box and automatically inserts *RE:* at the beginning of the original subject. This feature is extremely helpful because it takes the worry out of making a mistake retyping the sender's email address. Outlook also includes a copy of the sender's original message in the message box so it will be easy for the sender to see exactly what you are replying to. You can also edit or modify the content of the message you are replying to.

If you want to send your reply to everyone who received the original message, use the Reply All button instead of Reply. Take care with Reply All, though! If everyone on the original message really doesn't need to see your reply, don't use it. Most people get plenty of email, so don't burden them with messages they do not need.

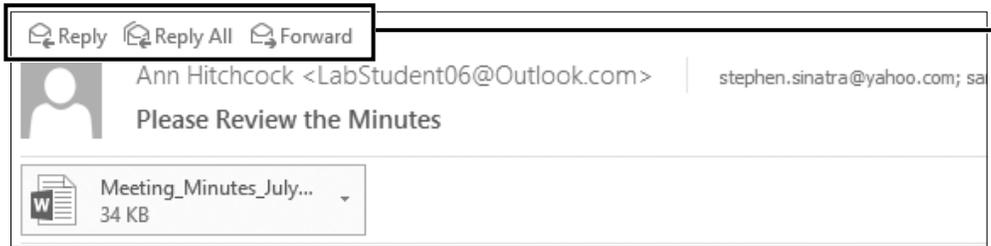
Forwarding a Message

You may receive a message that you'd like to share with others. As with replying, Outlook creates a new message, but this time it leaves the To box empty so you can enter the email address to which you would like to forward the message. When you forward a message, Outlook inserts *FW:* in front of the original subject. This lets the recipients know without opening the message that it has been forwarded through you from someone else. And remember, when someone forwards you a file, you don't really know where it came from. Always be careful when opening messages and attachments.

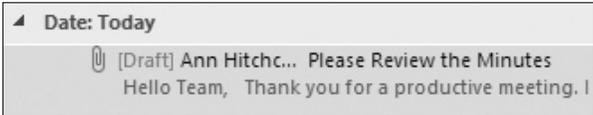
Note the options on the Message window Ribbon that allow you to reply to or forward messages.



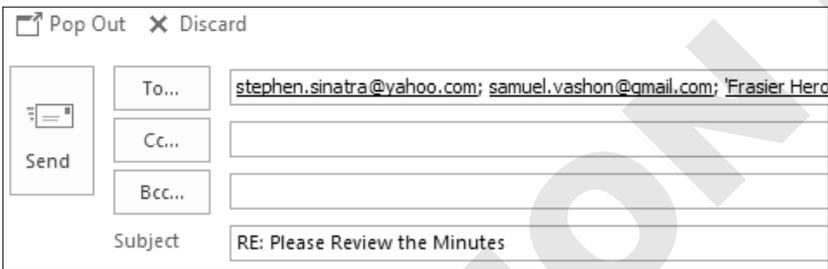
If you were to choose Reply All, the message would go to everyone in the To and Cc fields.



When viewing a message in the Reading pane, you can choose to quickly reply or forward it inline.



Once you choose to reply to or forward a message, Outlook places *[Draft]* in front of the sender of the email's name in the Contents pane.



When you choose to reply or forward inline, the message stays docked in the pane and provides buttons enabling you to Pop Out (open it in its own window) or Discard the message.

DEVELOP YOUR SKILLS OU2-D8

In this exercise, you will reply to the sender of an existing email message and forward another message, along with your commentary on it, to someone else.

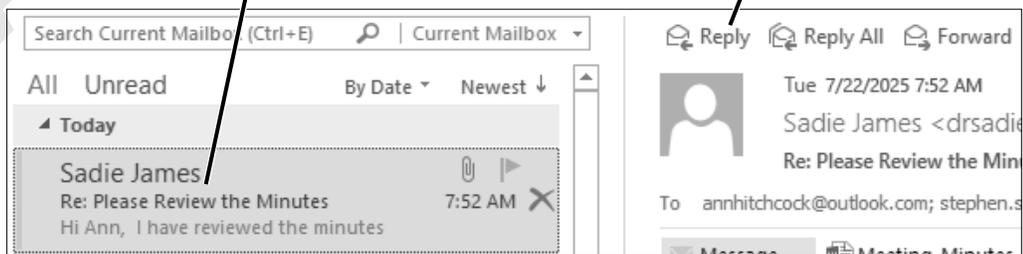


Complete this exercise live or via the online WebSim at: labyrinthelab.com/websims/O19-02-D8

- Follow these steps to reply to a message:
If working live, choose any email in your Inbox.

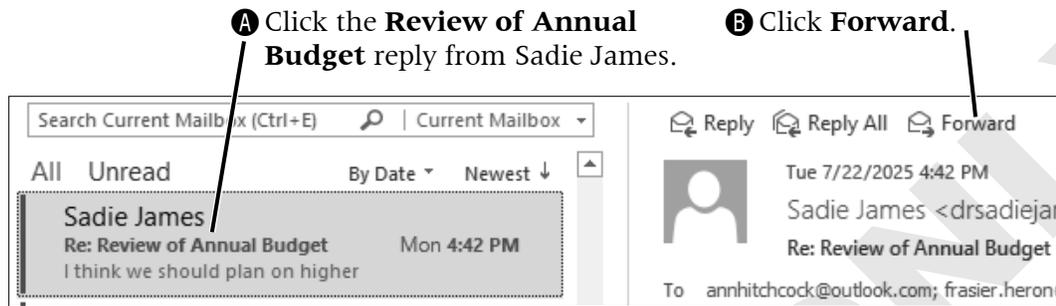
A Click the **Please Review the Minutes** reply from Sadie James.

B Click **Reply**.



- Type this message: **Thank you for catching the omission.**

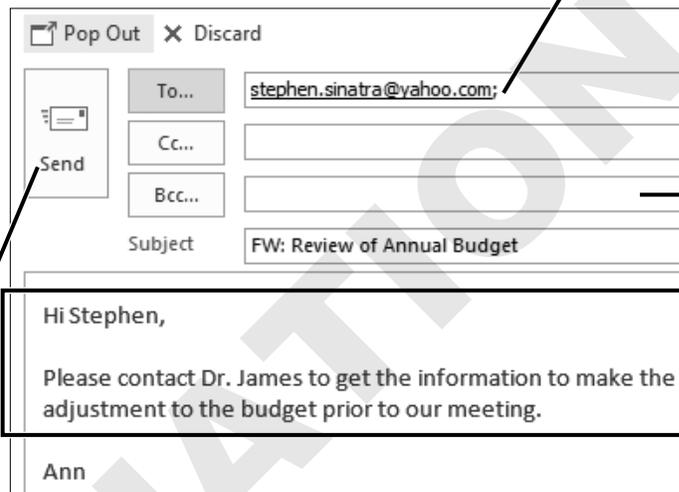
3. Send the message.
4. Follow these steps to forward a message:
If working live, select any email in your Inbox.



A Click the **Review of Annual Budget** reply from Sadie James.

B Click **Forward**.

C Address the message to **stephen.sinatra@yahoo.com**.



D Add your email address in the Bcc field.

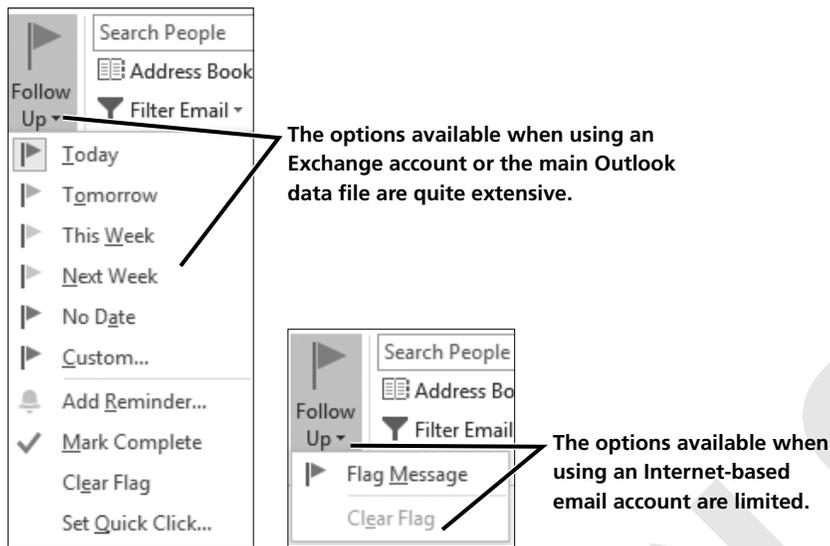
E Type the message body as shown.

F Click **Send**.

Flagging Messages

There are often situations where you will read a message and know that you need to take further action on it. It could be an email you need to respond to but don't have time to do so right away or another task that can't be completed immediately. You can quickly flag the message so it stands out from other messages and provides a reminder later on. These flagged messages will be added to your To-Do list, and you can search for them in your Inbox as well. Other options include flagging a message for Tomorrow, This Week, Next Week, or you can

create a custom reminder for a specific day. Once you have replied to the email or completed the task, you can then mark it as complete.

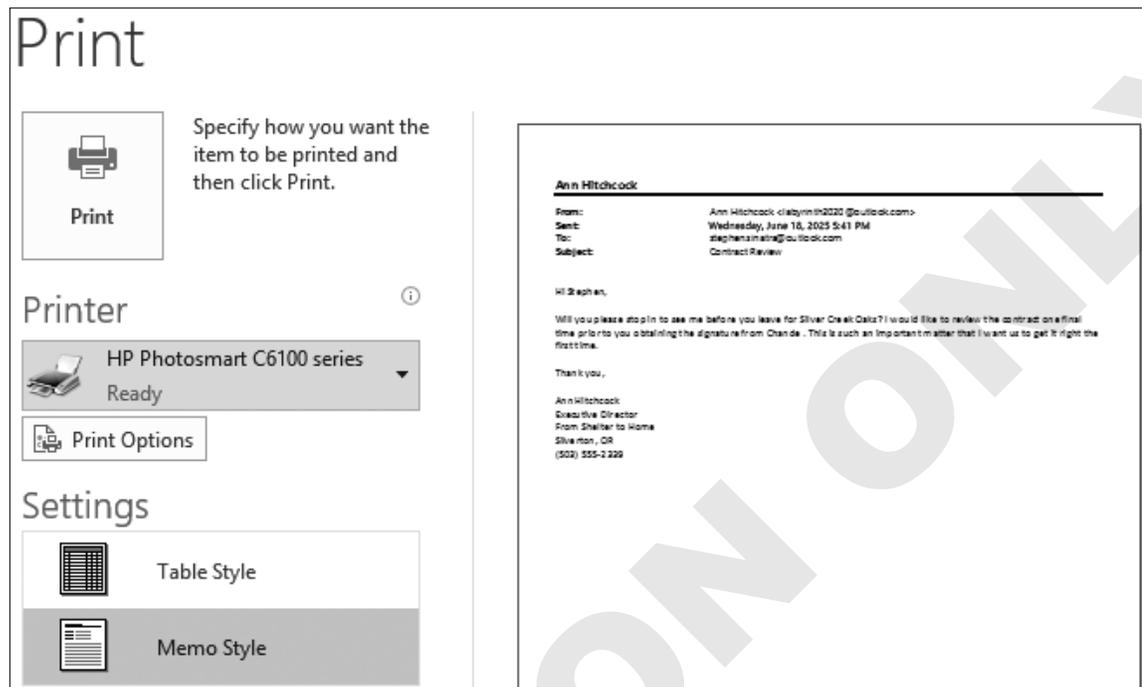


When you choose Home→Tags→Follow Up, the resulting menu will look different depending on whether you are using an Exchange account or an Internet account such as Outlook.com.

Printing Messages

You can print an email message just as you print a Word or Excel, or any other, file. From Backstage view, you can preview the selected message and choose print options. The default style to print messages is called Memo style. It prints your name, the message header

information (such as subject and date), and the message content. The Table style prints the list of items being displayed in the Contents window, such as the list of emails in the Inbox.



In Backstage view, you can select a printer, choose whether to print in Table or Memo style, and issue the print command. To the right of these options, you can also see a preview of what the message will look like printed.

To print an attachment, you first open the attachment and then print from its associated program. Or, you can choose Quick Print (right-click the attachment) to send the file to your default printer. Outlook then opens the program used to create the attachment and automatically prints the file.

DEVELOP YOUR SKILLS OU2-D9

In this exercise, you will quickly flag a message in your email list to indicate that further action is required. You will also print a message and its attachment.



Complete this exercise live or via the online WebSim at:
labyrinthlab.com/websims/O19-02-D9

1. Move your mouse pointer over the *Re: Please Contact Ahmed* message from Stephen and then click the flag.

If working live, flag any message in your Inbox.

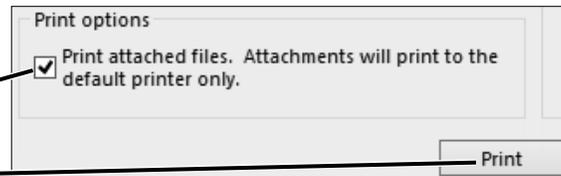


2. Select any email message with an attachment.
3. Choose **File**→**Print** and then choose **Print Options** to display the Print dialog box.
Note that the printer can be changed or selected from the Print window or the Print Options window.
If working live, click Cancel rather than Print Attached Files in the next step.

4. Follow these steps to print the message with its attachment:

A Click to place a checkmark in the **Print Attached Files** box.

B Click **Print**.



Organizing Messages

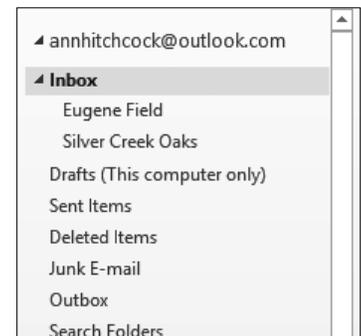
You may want to keep some messages that you send or receive for future reference. Leaving all incoming messages in the Inbox and outgoing messages in the Sent Items folder can become overwhelming as the number of messages grows. Some people get dozens or even hundreds of emails every day, so organizing these messages in folders is essential.

Usually you will have messages that somehow relate to one another, depending on the type of work you do. For example, you may send and receive messages to/from customers about their orders, your coworkers about projects you are working on, and vendors about supplies. An easy way to keep these messages organized is to store them in separate folders.

Folders

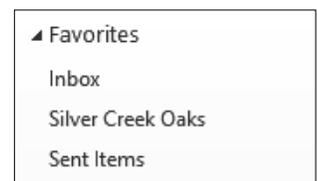
The folder structure you decide upon is the one that works best for you. In the illustration, you can see that Ann has created folders for the two facilities with which she works. You can use the Folder tab on the Ribbon to create a new folder or right-click an existing folder and choose New Folder to create a subfolder. New folders are placed in alphabetical order among the other folders.

You can also create a folder hierarchy similar to the way you save files on your computer, so folders can be placed inside folders, inside other folders. For example, you could have a folder for invoices, and then a folder for each year, and then a folder inside each year for each quarter.



Adding Folders to Favorites

You will see a list called Favorites at the top of the Folder pane. You get to choose which folders Outlook displays here, based on how you use the program. By default, some of the folders such as Inbox, Sent Items, and Deleted items will already appear here. You can add or delete folders from your Favorites at any time. You can also drag the folders to place them in any order you prefer.



Ann has chosen to include three folders in her Favorites.

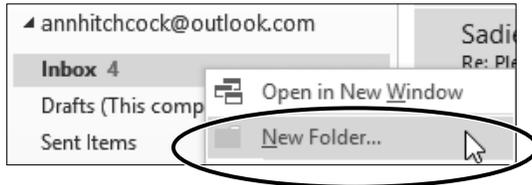
DEVELOP YOUR SKILLS OU2-D10

Saved emails can be placed in folders, just as paper documents are organized in folders within file cabinets. In this exercise, you will start organizing your saved messages by creating folders.

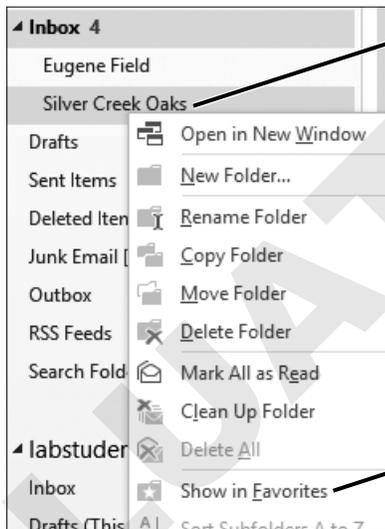


Complete this exercise live or via the online WebSim at:
labyrinthelab.com/websims/O19-02-D10

1. Right-click the **Inbox** folder and choose **New Folder** from the menu.



2. Type **Silver Creek Oaks** and tap **Enter**.
3. Right-click the **Inbox** folder again and choose **New Folder**.
4. Type **Eugene Field** and tap **Enter**.
5. Follow these steps to add a folder to your Favorites:



A Right-click the **Silver Creek Oaks** folder to display the shortcut menu.

B Choose **Show in Favorites** from the menu.

6. Click in the new **Silver Creek Oaks** folder within Favorites.

Notice that the new folder will be empty until you start moving messages into it.

Moving and Copying Messages to Folders

Once you have folders created, you can move new incoming or outgoing messages into them. At times messages will fly back and forth. You may not take the time with each and every message to immediately move it into a folder. Not to worry; you can select multiple messages and move them all at the same time from any folder into another one.

To select multiple messages, use the **Ctrl** key while clicking the desired messages. Or, to select several messages in a row, select the first message, hold down **Shift**, and then click the last one. The whole group is then highlighted and ready to move, copy, or delete.

DEVELOP YOUR SKILLS OU2-D11

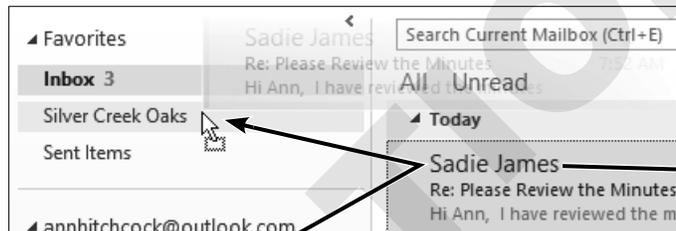
There are several ways to file your emails. In this exercise, you will move messages into an existing folder.



Complete this exercise live or via the online WebSim at:
labyrinthlab.com/websims/O19-02-D11

If working live, use any emails in your Inbox you no longer need, or move them back to the Inbox at the end of the exercise.

1. Click the **Inbox** in the Folder pane to display it.
2. Follow these steps to move a message:

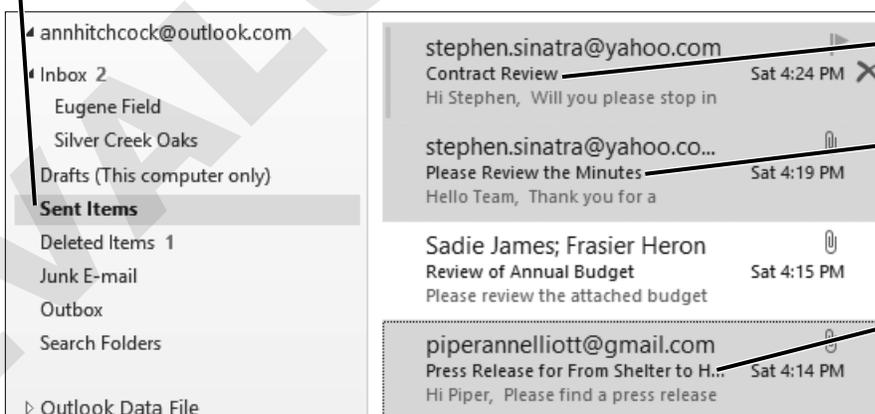


A Place your mouse pointer over the message from Sadie James.

B Click and drag it over to the **Silver Creek Oaks** folder and then release.

3. Follow these steps to select three messages to move to a folder:

A Click **Sent Items**.



B Click the **Contract Review** email.

C Hold down **Ctrl** and click **Please Review the Minutes**.

D Continue holding down **Ctrl** and click **Press Release for From Shelter to Home**.

4. Choose **Home**→**Move**→**Move** →**Other Folder** and then choose **Silver Creek Oaks** and click **OK**.

Quick Steps

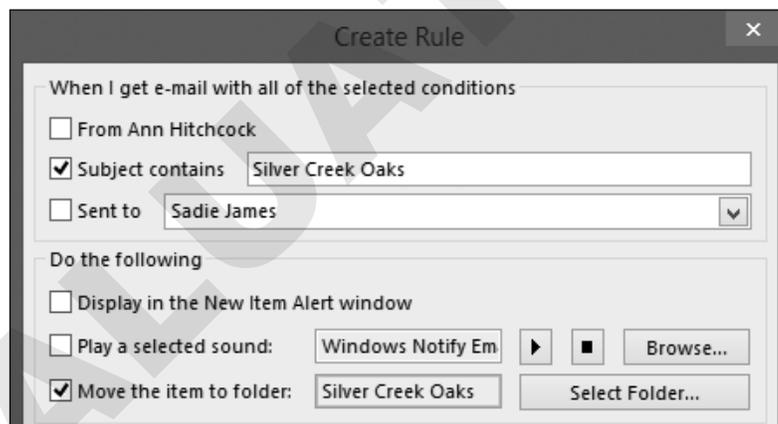
Outlook has a fantastic, time-saving feature called Quick Steps. They help by automating repetitive tasks, because several steps are combined into one button. For example, you might often forward client emails with certain information to your manager. After setting up the Quick Step button to do this, the next time a message that you need to forward arrives, you can do it with a click of the button. What a time-saver! There are built-in quick steps that can be customized, or you can create your own.



Quick Steps can be found on the Home tab. By default, five are created for you.

Rules

Rules are different than Quick Steps because they do not require any action. Similar to Quick Steps, Rules can be set up in Outlook to automate certain tasks. However, Quick Steps are instructions that you choose to apply in certain situations in Outlook, whereas Rules are automatically applied each and every time the criteria is met. For instance, you might want to have all email messages from your manager moved into a special folder and flagged. Or, you could create a rule to have Outlook to play a specific sound when you receive a message from a VIP customer.



The Create Rule window allows you to set up rules to automate specific tasks in Outlook.

DEVELOP YOUR SKILLS OU2-D12

In this exercise, you will create a Quick Step rule that will speed up the routine handling of regular messages.



Complete this exercise live or via the online WebSim at:
labyrinthlab.com/websims/O19-02-D12

1. Click the **Inbox** in the Folder pane.
2. Choose **Home**→**Quick Steps** and then click the gallery's **More**  button and choose **New Quick Step**→**Move to Folder** .

If the Move to Folder button is available in the gallery, you can click it there instead!

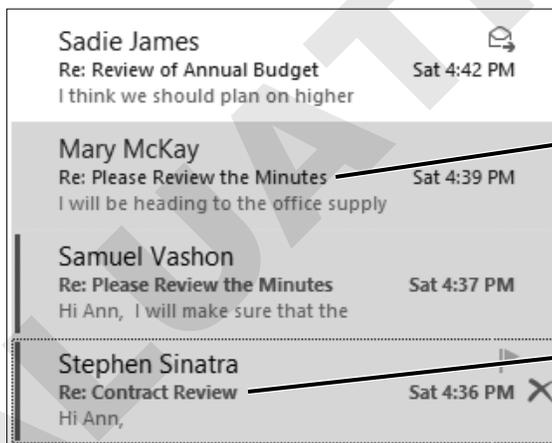
3. Follow these steps to set up the Quick Step:

- A Name the Quick Step:
Move to SCO

- B Click **Choose Folder** and choose **Silver Creek Oaks**.

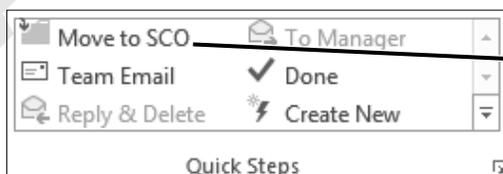
- C Click **Finish**.

4. Follow these steps to use the new Quick Step:



- A Click the message from **Mary McKay**.

- B While holding down **Shift**, click the **Contract Review** message from Stephen.



- C Click the **Move to SCO** Quick Step.

5. Choose **Home**→**Move**→**Rules**→**Create Rule**.

6. Follow these steps to create the new rule:

A Click the **Subject Contains** checkbox.

B Tap **Tab** and type: **Silver Creek Oaks**

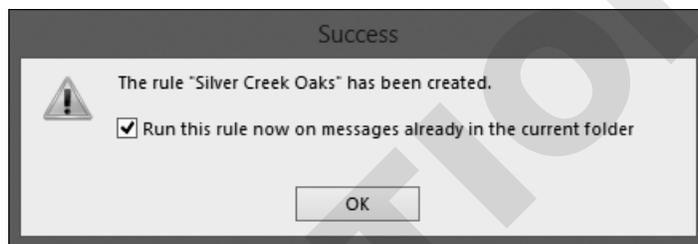
C Click the **Move the Item to Folder** checkbox.

D Click **Silver Creek Oaks**.

E Click **OK**.

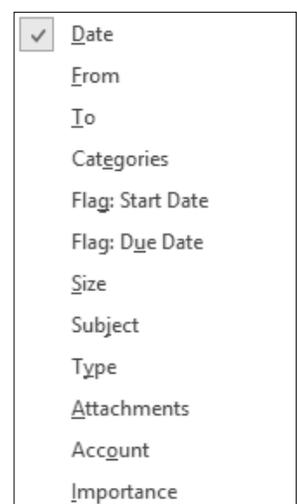
7. Click **OK** in the Create Rule window.

8. Click in the **Run This Rule Now** checkbox and then click **OK**.



Sorting Messages in a Folder

Email is such a popular method of communicating today that the number of messages in the Inbox and Sent Items boxes can quickly add up. Outlook allows you to easily sort your messages in the selected folder. By default, Outlook sorts by date, from newest to oldest. To locate a message you need, you can change the criteria by which messages are sorted. For example, if you place messages from customers in a separate folder, you might find it easier to locate messages in that folder by sorting the emails by name instead of date. You can also toggle between ascending or descending order, regardless of the sort used.

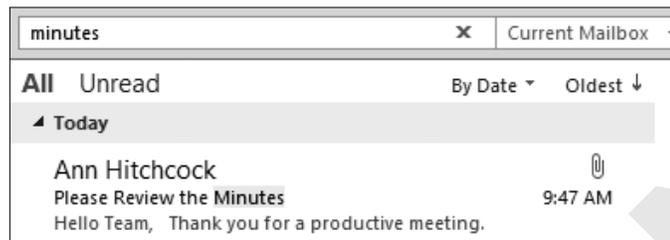


There are 12 criteria by which you can sort your messages.

Searching for Messages

Even with proper folders and sorting in place, you may find yourself looking for a specific email. If you can't find a message by sorting the messages in a folder, you can search for it instead. Outlook's search feature works much like most others; simply type a keyword or name contained in a message to quickly see a list of matching results. If you recall a message you received from a person but aren't sure when, you can quickly find all correspondence with that person by doing a search for their name.

Initially, the search is performed on the current folder. If it's not found there, you can expand the search to include the entire mailbox, or all mailboxes if you use multiple email addresses. Much like Internet searching, search suggestions will appear to assist in completing your search.



To find the message she sent with the meeting minutes attached, Ann searched using the keyword *minutes*. Outlook highlights the keyword when it displays the results.

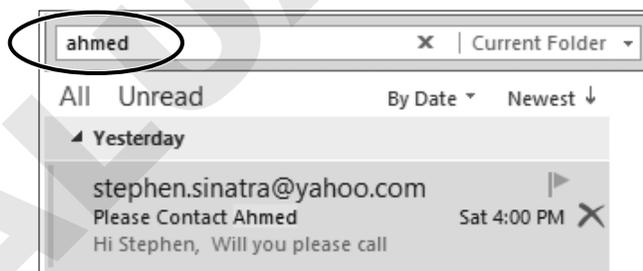
DEVELOP YOUR SKILLS OU2-D13

You have a computer assistant! The Search window can assist you in locating Outlook items. In this exercise, you will search for messages containing a particular name.



Complete this exercise live or via the online WebSim at:
labyrinthelab.com/websims/O19-02-D13

1. Click the **Sent Items** folder in the Folder pane.
2. Click in the **Search Sent Items** box at the top of the Inbox and type: **ahmed**



3. Click the **Close** button to the right of *ahmed* to close the search.

Deleting Messages

When you delete a message, it's sent to the Deleted Items folder. It's important to note that the message is still in your Outlook files until you empty this folder. The nice thing about this is that if you delete a message by mistake, until the Deleted Items folder is emptied, you can move the message back into any other Outlook folder. If you're using Outlook in a corporate setting, your systems administrator probably has set up an automated system whereby your Deleted Items folder is emptied on a regular basis. You can empty the folder manually at any time by right-clicking the Deleted Items folder and choosing Empty Folder. Just as with moving a group of messages at the same time, you can use the same procedure for selecting a group of messages to delete.



When you move your mouse pointer over a message, a red X appears on the right side; clicking it deletes the message and moves it to the Deleted Items folder.

☰ Home → Delete → Delete

DEVELOP YOUR SKILLS OU2-D14

Most messages don't need to be saved forever. In this exercise, you will delete a message and then empty the Deleted Items folder.



Complete this exercise live or via the online WebSim at:
labyrinthlab.com/websims/O19-02-D14

1. Ensure you are still viewing the Sent Items folder and that the first message is selected.
2. Tap **Delete** to move the message to the Deleted Items folder.

If working live, before completing the next step, ensure there are no important emails in your Deleted Items folder, as they will be permanently removed!

TIP! You can press **Ctrl+Z** to undo the last action, which in this case would move the deleted email back to its original folder.

3. Right-click **Deleted Items** in the Folder pane and choose **Empty Folder** in the menu.
4. Choose **Yes** in the message box that displays.

Archiving Messages

All items in Outlook are stored in a special Outlook data file. As you accumulate more and more messages and other items such as calendars, the data file becomes especially large, which can ultimately slow Outlook's performance. You can free up space by creating a separate Archive folder. There may be messages you don't need to keep in current folders but that you don't want

to delete immediately. For example, you may have many messages related to an old project. It's possible that, in the future, you may need to refer to some information contained in those messages. Archive folders are available for the other Outlook components also. So, you could, for example, keep copies of your old calendars.

You can create subfolders in the Archive folder exactly the same way you create them in any other folder. You can move messages into the subfolders in Archive by using the same methods as for other folders. Create your own archive subfolders in the Archive Folders Inbox and move messages into them accordingly.

DEVELOP YOUR SKILLS OU2-D15

Saved messages often fill up active folders. In this exercise, you will move messages you want to retain to the Archive folder.



Complete this exercise live or via the online WebSim at:
labyrinthlab.com/websims/O19-02-D15

1. Choose **File** and then, on the Account Information page, choose **Tools**→**Clean Up Old Items...**

Note that options here include which folders to archive, the date of emails to include, and changing the folder where the archived messages will be saved.



2. Click **Cancel** to close the Archive window.
3. Click the **Back**  button to leave Backstage view and return to your Outlook program.
4. If necessary, select the **Inbox** in the Folder pane.
5. Select the message from Mary McKay.
If working live, choose a message from a classmate that you no longer need or skip this step.
6. Click the **Archive** button in the Delete group on the Home tab.

Self-Assessment

Check your knowledge of this chapter's key concepts and skills by completing the Self-Assessment on the Student Resource Center.

Apply Your Skills

APPLY YOUR SKILLS OU2-A1

Send Messages

As the new Regional Manager at Universal Corporate Events, you will have a lot of email communication with your clients. You know professionalism and organization will be important. In this exercise, you will create a signature, send an email to a client, and include your manager in the Bcc field.

NOTE! All the Apply Your Skills exercises in this course are to be completed live in Outlook (not as WebSims).

1. Choose **Home**→**New**→**New Email**.
2. Address the message to two of your classmates, putting one address in the To field and the other in the Bcc field.
3. Draft the message:

Subject	Meeting Confirmation
Message	<p><i>Type the misspellings!</i></p> <p>Hello Samuel,</p> <p>Please conform the details for your evnt next weak are correct. You require a meeting room for 24 guests, from 8am to 11am, with coffee, mufins, and fruit served at 9am.</p>

Create a Signature

4. Open the **Signatures and Stationery** window and click **New**.
5. Name the signature: **Universal** and use this text:

Thanks,

[Your Name]

Regional Manager

Universal Corporate Events
6. Save the signature and then close the Signatures and Stationery window.
7. Insert the **Universal** signature into your message.

Review and Send the Message

8. Locate and correct the two spelling mistakes the Spelling & Grammar checker finds and then proofread the message to find the two additional errors that it didn't catch.
9. Send the message.

APPLY YOUR SKILLS OU2-A2

Manage Incoming Email

In this exercise, you will flag a message as a To-do item. You'll then forward that message and create a folder to move the message into.

1. Check your Inbox for messages from your classmates (you may have to wait a few minutes before they arrive).
2. After receiving the first message, click the flag once to add the item to your to-do list for today.
3. Open the flagged email and forward the message.
4. Enter the email of a classmate in the Cc field, leaving the To field blank.
5. In the body of the message simply type: **FYI**
6. Add an attachment to the message using any file from the Recent Items list.
7. Send the message.
8. On the Meeting Confirmation email you received, click the flag once to mark the item as complete.

Add Folders

9. Create a new folder in your Inbox, naming it: **Customer Events**
10. Move the Meeting Confirmation email to the Customer Events folder.
11. Open the Customer Events folder.
It will be easier to locate future customer orders using their name rather than the dates of the emails, so you will now change the sort method.
12. Click the **By Date** button and choose **From** (it's below *Arrange By*).
With only one email currently in the folder, you will not notice anything different when the sorting method is changed, but imagine if you had twenty or more emails!

APPLY YOUR SKILLS OU2-A3

Create a Rule

In this exercise, you will create a rule that automatically moves incoming messages to a folder.

1. Right-click the **Meeting Confirmation** email and choose **Rules**→**Create Rule...**
2. Click the **Subject Contains** checkbox and verify that the text shows *Meeting Confirmation*.
3. Click the **Move the Item to Folder** checkbox, select the **Customer Events** folder (you may need to click the Inbox to expand the folder list), and click **OK**.
4. Click **OK** to create the new rule.
*If there's a chance you'll actually receive an email with the subject "Meeting Confirmation," you can go to **Rules**→**Manage Rules & Alerts** and delete this rule so future emails don't get sent to this folder.*